

CONFIDENTIAL

EXHIBIT B

MARY JO HUDSON CV

Mary Jo Hudson

Business

Squire Patton Boggs (US) LLP
2000 Huntington Center
41 South High Street
Columbus, Ohio 43215
mj.hudson@squirepb.com
614-365-2732 (office)

Home

955 Delaware Ave
Columbus, Ohio 43201
Mj.hudson01@yahoo.com
614-560-9692 (cell)

Experience

February 2017 to Present

Partner, Squire Patton Boggs

Lead counsel for US insurance regulatory practice with emphasis on providing strategic advice and representation in multi-state insurance regulatory compliance and market conduct matters, including financial regulation, product standards and development, distribution, and regulatory policy development. Provide clients with strategic advice regarding most efficient means of achieving compliance goals and requirements. Practice also includes service as an expert witness on matters related to the regulation of insurance companies. Special practice emphasis includes service as defense of unclaimed property audits, including representation of life insurance companies in matters associated with unclaimed benefits.

February 2011 to February 2017

Member, Bailey Cavalieri LLC, Columbus Ohio.

Legal practice with emphasis on multi-state insurance regulatory compliance and issues affecting company governance and operations, including company licensing and holding company compliance issues, multi-lines product regulation, market conduct audit defense, agent licensing and product distribution issues, corporate governance and NAIC issues. Practice also includes service as an expert witness on matters related to the regulation of insurance companies including stranger-originated life insurance transactions, life insurance and property casualty product distribution and claims issues, solvency regulation, corporate governance, product regulation, market regulation and agent duties. Special practice emphasis includes audit and market conduct examination defense of life insurance companies in matters associated with unclaimed benefits.

February 2011 to June 2016

Member, Board of Directors and Audit Committee

AIG Property Casualty, Inc.

Independent member of board of directors and audit committee member for holding company operating the AIG Property & Casualty commercial and personal lines insurance operations of American International Group, Inc. in 130 countries through nine principal business units and 12 domestic insurance companies. Audit committee work includes focus on independent audit review, Model Audit Rule oversight, review of financial controls, review of US statutory financial statements and US regulatory matters.

January 2014 to May 2016 (Winter Semesters)

Adjunct Professor of Law, Capital University Law School, Columbus Ohio.

Instructor of two-hour elective Insurance Law course with focus on coverage and regulatory basics of all major lines of consumer and commercial insurance.

January 2007 to January 2011

Director, State of Ohio, Department of Insurance.

Director of Insurance for State of Ohio and Cabinet member for Governor Ted Strickland, overseeing state agency responsible for regulating the 9th largest insurance market in the United States, and the 19th largest insurance market in the world, with approximately 250 domestic insurance companies, and 1397 foreign and alien insurance companies, writing over \$55 billion in annual premium, with approximately 270 staff members and a budget of approximately \$35 million annually. While serving as Director, the Department was also responsible for licensing and overseeing over 283,000 resident and nonresident insurance agents, and also served as a law enforcement agency, referring and assisting with prosecution of insurance fraud and other criminal activity related to insurance matters.

Responsibilities included final approval of all company license applications and significant corporate transactions, review of troubled company oversight action plans, development and final approval of company consent orders regarding financial oversight and market conduct matters. Also responsible for development and implementation of emergency or necessary regulatory or market clarifications and issuance of regulatory alerts and bulletins. Further responsibilities included oversight of all legislative and policy matters, including Ohio health care coverage and quality improvement initiatives, such as State Coverage Initiative, formation of Ohio Health Information Partnership and chairing the Ohio Health Care Coverage

and Quality Council. Also responsible for public representation of Department, including service as Ohio's representative on the Interstate Insurance Product Regulation Commission (IIPRC)(nka Interstate Insurance Compact or ICC) Management Committee, and as an Executive Committee member of the National Association of Insurance Commissioners (NAIC), along with public appearances at Ohio and national industry and civic events.

Additional duties included statutorily-required service as fiduciary liquidator for 11 domestic insurance companies in receivership, responsible for active management of over \$156 million in assets and a 59 member staff.

Highlights

- Prohibition of STOLI and STOA in Ohio. Led Department's efforts to lobby the Ohio General Assembly to adopt H.B. 404 to amend Ohio's viatical sales laws and improved Ohio's regulation of life settlements and adopted a prohibition on stranger originated life insurance (STOLI) transactions. Adopted law is recognized as one of strongest anti-STOLI laws in the nation. Also, adopted the first bulletin in the country regarding collaborative efforts that the Department and Ohio life insurance writers could take to avoid stranger originated annuity transactions in Ohio.
- Protecting Ohio Military Personnel and Families. Advocated for and adopted administrative rules in response to the federal Military Personnel Financial Services Protection Act to clarify regulation associated with life insurance product sales to military members and their families.
- Financial Reporting Reform. In 2009, the Department adopted Bulletins to address a change in calculating and reporting deferred income tax assets, changing minimum reserve liabilities, and for calculation of variable annuity reserves with products containing a guaranteed living benefit.
- Uniform Annuity Disclosure Pilot. Established a pilot program to test the effectiveness of uniform annuity disclosures, in collaboration with the American Council of Life Insurers and the Association of Ohio Life Insurance Companies.
- Missing Life Insurance Program. Developed a collaborative program with life insurance companies writing in Ohio to assist Ohio residents with efforts to locate missing life insurance policies through secure technology.

- Agent Licensing and Bail Bond Reform. Led advocacy for and oversaw initial implementation of H.B. 300 which amended Ohio's agent licensing code to bring it into conformity with the NAIC Uniform Producer Licensing Model Act, and streamlined the agent licensing and renewal process. H.B. 300 also improved the Ohio requirements for licensing bail bond agents, including pre-licensing testing and oversight of market activities. Also served as an active member of the NAIC Producer Licensing Task Force, and participated in NAIC's Gramm Leach Bliley compliance reviews of various insurance departments.
- Senior Specific Sales Certifications. Led an effort to adopt an administrative rule to prohibit insurance agents from utilizing non-accredited certifications and designations in sales of life insurance, annuities and health insurance.
- State Health Insurance Reform. Led Ohio's participation in the State Coverage Initiative (SCI) and State Quality Improvement Initiative (SQII), utilizing input from an advisory body of stakeholders from varied disciplines associated with health care coverage and delivery. Recommendations from the SCI and SQII efforts were utilized to develop legislative proposals and insurance code revisions that were adopted by the Ohio General Assembly, including individual market rate reform, adult dependent coverage and implementation of the Healthcare Coverage and Quality Council (HCCQC). The HCCQC led efforts associated with (1) developing a standard definition of a medical home, (2) payment reform recommendations for the Ohio healthcare market, (3) initiation of the State Action on Avoidable Hospital Readmissions (STAAR) program and (4) development of initial recommendations from stakeholders regarding an Ohio-based insurance exchange.
- Federal Insurance Reform. Organized and developed Ohio's regulatory response to the Patient Protection and Affordable Care Act, including development of the federally-sponsored high risk pool for Ohioans, obtaining grant funds for rate review, consumer outreach and exchange planning.
- Liquidations. Increased reinsurance recoveries by over 50 percent, settled numerous protracted litigation matters, oversaw administrative consolidation of 3 facilities, oversaw closure 3 estates, and improved transparency with court, through improved reporting and implementation of uniform administrative procedures.

Speaking Engagements

- Multiple appearances to provide testimony on specific bills and budget proposals before Ohio General Assembly committees, including the House and Senate Insurance Committees and Finance and Appropriations Committees.
- Over 300 public appearances to professional and trade associations throughout Ohio and the United States.
- Ohio appearances included multiple keynote presentations for Ohio Insurance Institute, Association of Ohio Life Insurance Companies, Ohio Association of Mutual Insurance Companies, Ohio Bail Agents Association, Ohio Fraternal Association, Ohio Land Title Association, Independent Insurance Agents of Ohio, Professional Insurance Agents of Ohio, NAIFA Ohio, the Ohio State Medical Association, the Ohio Hospital Association, Academy of Medicine of Northeast Ohio, plus various regional agent organizations across Ohio.
- National appearances included presentations before conferences sponsored by American Council of Life Insurers, Association of Insurance Compliance Professionals, American Academy of Actuaries, National Association of Insurance and Financial Advisors, Property Casualty Insurance Association of American, National Association of Mutual Insurance Companies, National Conference of Insurance Legislators, Council of State Governments, the New York Bar Association (CLE program), NAIC (E-Reg, CLE programs, solvency symposium speaker) and American Bar Association Tort & Insurance Practice Section (CLE program).

NAIC and Interstate Insurance Product Regulation Commission (IIPRC) Leadership Positions

- 2010, NAIC Executive Committee Member.
- 2010, Midwest Zone Secretary-Treasurer.
- 2010, EX Task Force on Statutory Accounting and Reporting.
- 2010, EX Task Force on Market Conduct Accreditation.
- 2010, EX Task Force on Retained Asset Accounts
- 2009-2010, EX Task Force on Solvency Modernization.
- 2009-2010, Chair, System of Electronic Rate and Form Filing (SERFF) Board.

- 2008-2009, Chair, Speed to Market Task Force.
- 2008, Vice Chair, Financial Examination (E) Committee.
- 2009-2010, Chair, IIPRC Management Committee.
- 2008-2009, Vice Chair, IIPRC Management Committee.
- 2007-2008, Secretary-Treasurer, IIPRC Management Committee.

January 1997 to January 2007

Member, Bailey Cavalieri LLC (formerly Arter & Hadden), Columbus, Ohio

Corporate attorney, with emphasis on corporate and commercial law, including advising retailers on matters related to advertising, point of sale consumer law compliance, and consumer finance compliance; unclaimed funds planning, compliance and audit defense; Ohio liquor license compliance; insurance and managed care regulation; commercial lending and securitizations; and formation and planning for small businesses.

July 1996 to December 1996

Attorney, Schwartz, Warren & Ramirez, Columbus, Ohio.

Corporate department attorney, with emphasis on commercial lending, corporate and consumer law matters (Left firm as part of practice group merger with Arter & Hadden LLP).

October 1989 to July 1996

Ohio Department of Insurance and the Office of the Ohio Insurance Liquidator, Columbus, Ohio.

January 1991 to July 1996

Deputy Liquidator and General Counsel, Office of the Ohio Insurance Liquidator

In-house attorney and fiduciary officer for insurance company receiver, operating up to 10 insurance company estates and managing up to 60 employees. Responsibilities included on-site supervision of liquidation operations, litigation oversight, employment matters, insurance claims review, asset recovery and collections.

October 1989 to January 1991

Special Services Attorney, Ohio Department of Insurance, Columbus, Ohio

Attorney for Examination Audit Division and special assignment attorney for Superintendent of Insurance and Deputy Director, with emphasis on special legislative and solvency matters, including supervisions, rehabilitations and liquidations.

August 1988 to October 1989

Schwartz, Kelm, Warren & Rubenstein, Columbus, Ohio

Corporate department associate assisting with securities matters, commercial lending, trade regulation and consumer credit compliance issues.

Education

Miami University, Oxford, Ohio. B.A., Public Administration (1985).

University of Cincinnati, College of Law, Cincinnati, Ohio. Juris Doctor (with honors) (1988).

Expert Witness Engagements

Whitman v. State Farm Life Insurance Co., Case No. 3:19-cv-06025-RBL (U.S. Dist. Ct., WA at Tacoma)(insurance regulation and life insurance expert)(Report provided)(Case pending).

McKinley Development Leasing Company Ltd. v. Westfield Ins. Co., Case No. 2020 CV 000815 (Stark Co. (OH) Ct. of Common Pleas)(Defense expert regarding insurance regulation and business interruption coverage dispute).

Levy v. Dawson; Allianz Life Insurance Co. of North America, Case No. 20NBCV00102 (CA Sup. Ct., Los Angeles Co.)(Defense expert for Allianz Life regarding agent appointment and licensing)(Report provided)(Report provided)(Case pending).

Bally v. State Farm Life Insurance Co., Case No. 18-cv-04954-CRB (U.S. Dist. Ct., N.D. CA)(insurance regulation and life insurance expert)(Report provided)(Case pending).

Wagner v. Sims, Brendanwood Financial Brokers, LLC, Brendanwood Financial Services, LLC, Lincoln National Life Insurance Co. and North American Company for Life and Health Insurance, Cause No. 29C01-1912-PL-0011273 (Hamilton Co., IN Cir. Ct.)(Agent duty dispute – expert for Lincoln and North American)(Affidavit provided)(Case settled).

Indiana Repertory Theater v. The Cincinnati Casualty Company, Cause No. 49D01-2004-PL-013137 (Marion Co. IN Sup. Ct.)(Business interruption coverage dispute)(Affidavit provided)(Case pending).

Queen's Tower Restaurant, Inc. dba Pastavista v. Cincinnati Financial Corporation, Case No. A2001747 (Hamilton Co., Ohio Ct. Common Pleas)(Business interruption coverage dispute)(Affidavit provided)(Case pending).

Hiu Yu v. American General Life Insurance Company, Case No. 5:19-cv-01788 (C.D. CA)(Insurance regulation and life insurance expert)(Report provided)(Case pending).

Berthiaume, et. al. v. Allianz Life Insurance Company and Imeriti, Inc., Case No. 27-CV-17-15118 (Hennepin Co, Minn., 4th Judicial District)(Defense expert regarding agent appointment and licensing)(Report provided)(Case resolved).

State of West Virginia ex. rel. John D. Perdue v. Pacific Life Insurance Company, Case No. 12-C-429 (Cir. Ct., Putnam Co., WV)(Defense expert regarding historic regulation history and use of Death Master File by life insurance companies)(Deposition provided)(Case pending).

State of West Virginia ex. rel. John D. Perdue v. Western Southern Life Insurance Company, Case No. 12-C-331 (Cir. Ct., Putnam Co., WV)(Defense expert regarding historic regulation history and use of Death Master File by life insurance companies)(Deposition provided)(Case pending).

State of West Virginia ex. rel. John D. Perdue v. Western Southern Life Assurance Company, Case No. 12-C-355 (Cir. Ct., Putnam Co., WV)(Defense expert regarding historic regulation history and use of Death Master File by life insurance companies)(Deposition provided)(Case pending).

State of West Virginia ex. rel. John D. Perdue v. The Lafayette Life Insurance Company, Case No. 12-C-446 (Cir. Ct., Putnam Co., WV)(Defense expert regarding historic regulation history and use of Death Master File by life insurance companies)(Deposition provided)(Case pending).

Brach Family Foundation, et.al. v. AXA Equitable Life Insurance Co., Case No. 1:16-cv-00740 (S.D.N.Y.)(insurance regulation and life insurance expert)(Report and deposition provided)(Case pending).

Moriarty v. American General Life Insurance Company, Case No. 3:17-cv-01709 (S.D. Cal)(Insurance regulation and life insurance expert)(Report provided)(Case pending).

Dobbs v. American National Property and Casualty Company, Civil Action No. 16-C-175 (Marshall Co., WV Circuit Court)(insurance score and data confidentiality claims)(Testimony outlined)(Case settled).

First Unitarian Church of Cincinnati v. Louis Randall Siciliano, Case No. A1702136 (Hamilton Co., Ohio Ct. of Common Pleas)(plaintiff's expert for assignee of suitability and agent duty claim)(Report and deposition provided)(Case settled).

Wellpoint, Inc. v. National Union Fire Insurance Company of Pittsburgh, PA.; AIG (UK) Limited; New Hampshire Insurance Company; Continental Casualty Company; Arrowwood Indemnity Company, Twin City Fire Insurance Company; Liberty Mutual Insurance Company (UK) Limited and certain underwriters at Lloyds, Case No. 49D10-0507-PL-26425 (Marion Co. Indiana Superior Court)(Defense expert for Continental Casualty Company regarding insurance regulation issues)(Case settled).

State of West Virginia ex. rel. John D. Perdue v. Physicians Life Insurance Company, Case No. 12-C-421 (Cir. Ct., Putnam Co., WV)(Defense expert regarding historic regulation history and use of Death Master File by life insurance companies)(Case settled).

State of West Virginia ex. rel. John D. Perdue v. Provident Life and Accident Insurance Company, Case No. 12-C-425 (Cir. Ct., Putnam Co., WV)(Defense expert regarding historic regulation history and use of Death Master File by life insurance companies)(Case settled).

State of West Virginia ex. rel. John D. Perdue v. Colonial Life Ins. & Accident Co., Case No. 12-C-431 (Cir. Ct., Putnam Co., WV)(Defense expert regarding historic regulation history and use of Death Master File by life insurance companies)(Case settled).

Carson v. State Farm Fire & Casualty Company, Case No. 1-18-cv-00373 JG (U.S. District Ct., Northern District, Eastern Division)(Defense expert regarding Ohio claims handling regulation)(Case settled).

Bagdasarian Insurance Group and Christopher Bagdasarian, individually v. E. & J. Gallo Winery, et. al. Case No. 15CV03781 (CA. Sup. Ct., Santa Barbara Co., Anacapa Div)(Defense/Cross Complainant expert regarding agent duties and standards of care)(Deposition provided)(Case settled).

Rozo v. Principal Life Insurance Company, Principal Financial Group, Civil Action No. 4:14-cv-00463 (S.D. Iowa)(Defense expert regarding state insurance regulation)(Deposition provided)(Case settled).

Griffiths v. Aviva London Assignment Corporation, et. al., Civil Action No. 15-13022-NMG (D. MA)(Defense expert regarding state insurance regulation)(Report provided)(Case settled).

Wood v. Prudential Retirement Insurance and Annuity Company, Case No. 3:15-cv-1785 (VLB), U.S. Dist. Ct., Conn. (Defense expert on state insurance regulation)(Report provided)(Case settled).

SHKA Architects, P.S., Inc. v. Pacific Life Insurance Company and Orion Insurance Group, Case No. 16-2-24568-4 SEA, King Co. Washington Superior Court (Defense expert regarding agent appointment and life insurance application and replacement process issues; declarations and report provided)(Report provided)(Case settled).

Christina Chavez v. Massachusetts Mutual Insurance Company, Case No. BC 435321 Los Angeles County, CA Superior Court (Defense expert regarding rights of life insurance policy owners in mutual company)(Deposition and trial testimony provided)(Jury verdict for Defense).

David v. Bankers Life and Casualty Company, Case No. 2:14-CV-00766-RSL W.D. Wash.)(Defense expert regarding state insurance regulation of producer licensing and product distribution in proposed class action to determine employment status of independent contractor producers)(Case settled).

Donald Boyce and Darlene Boyce v. One America Securities, Inc., Case No. 14-01774, FINRA Arbitration (Consulting expert for defense regarding regulation of life insurance sales)(Case settled).

Ross, et. al. v. AXA Equitable Life Insurance Company, Case No. 14-cv-2904-JMF (S.D. N.Y.)(Defense expert regarding state insurance regulatory issues)(Report provided)(Case dismissed in favor of defense; appeal pending).

Wolfe v. Grange Indemnity Insurance Company, et. al., Case No. 2009-CV-01508 (Stark Co., Ohio Court Common Pleas (Consulting expert on issues associated with class certification in personal automobile medical payment coverage dispute)(Case settled).

Jacobsen v. Allstate Insurance Company, Cause No. ADV-03-201(d), Montana Eight Judicial District Court (Consulting expert for defense regarding claims processing procedures)(Case settled).

Loretta Scott v. Steven J. Laux, Cause No. 11SL-CC00239, St. Louis County, Missouri Circuit Court (Expert for Phoenix Life Insurance Company in reverse STOLI case)(Deposition provided)(Case settled).

United States v. Vincent Bazemore, United States District Court, Northern District of Texas (criminal case)(Trial expert witness for United States Attorney providing jury with

background on life insurance, life settlements and STOLI)(Testified at trial)(Defendant convicted of mail fraud).

Stephanie Lanford v. Banner Life Insurance Co., Paul Aidala, Rebecca Aidala, and CIGI Direct Insurance Services, Inc., Case No. B110346-C (Tom Green County, Texas District Court) (Disputes arising out of claim on replacement policy made after insured's suicide) (Defendant Banner Life Insurance Company expert)(Deposition Provided)(Case settled).

Conestoga Settlement Trust v. The RE Family Trust, Shea Ungar a/k/a Hershey Ungar, Trustee of the RE Family Trust, and American National Insurance Company, Case No. 2011-CI-17464 (Bexar Co., Texas District Court)(Expert for defendant American National Life Insurance Company on stranger originated life insurance issues (Report and deposition provided)(Case pending).

US Bank, National Association, as securities intermediary for Lima Acquisitions, LP v. PHL Variable Insurance Company, Case No. CV12-03046 (U.S. District Ct., Central Dist. CA, Western Div.)(Private action for unfair and deceptive claims handling of life insurance claim)(Defendant expert on claims handling procedure)(Deposition and trial testimony provided)(Unanimous verdict for defendant).

Colony Insurance Company v. NJC Enterprises, L.L.C., Civil Action No. 09-763 (U.S. Dist. Ct., Middle Dist. LA)(Expert for Defendant in Counterclaim, Hartford Fire Insurance Company)(Premium payment and finance regulation issues)(Report provided)(Summary judgment ruling for Hartford Fire Insurance Company).

Professional Risk Advisors, Inc. v. Melo, Inc., Case No. CV 11-761606 (Cuyahoga Co. Ct. Common Pleas)(Insurance agent duty expert)(Report provided)(Case settled).

Heritage Christian Schools, Inc. v. ING North American Insurance Corporation, Security Life of Denver, et.al., Case No. 2:11-cv-10167LA (U.S. Dist. Ct., E.D. Wis.)(Insurance solvency regulation expert)(Report provided)(Case settled).

The Family Trust Created Under the Howard F. Kramer and Betty G. Kramer Loving Trust v. Thomas C. Davy, Nationwide Life Insurance Company of America and Nationwide Securities, LLC, Financial Industry Regulation Authority, Inc., Arbitration Div., Case No. 10-05476 (FINRA action involving possible STOLI; regulatory expert for defense)(Case settled).

Wanda Range v. The Cincinnati Life Ins. Co., Case No. 1:11-CV-1367 (U.S. Dist. Ct., Northern Dist., Eastern Div)(2012)(Life insurance regulation and death master file use expert)(Report provided)(Case removed to state court).

In re Bankers Life & Casualty Co., et. al, Maine Bureau of Ins., Docket Nos. 09-212, 09-201, 09-213, 203 (Annuity suitability issues; expert for Bankers Life & Casualty Co.)(Testified at administrative hearing)(Decision and Order 5/12/11 – company fined).

Publications

Co-author, "Interstate Insurance Compact: Governance Assessment", Squire Patton Boggs, November 2020 (https://www.insurancecompact.org/documents/2020-12_report-governance_review_spb.pdf).

Co-author, "*COVID-19 and Additional Regulatory Directives for Insurance Companies*," Squire Patton Boggs Client Alert, March 2020.

Co-author, "*Insurance Departments and Congress Address COVID-19 Coverage and Risks in Myriad of Regulatory Directives That Impact All Lines of Insurance*," Squire Patton Boggs Client Alert, March 2020.

Co-author, "*COVID-19 and US Health Insurance: New Regulatory Directives – Stafford Act – State of Emergency*," Squire Patton Boggs Client Alert, March 2020.

Co-author, "*COVID-19 and US Health Insurance New Regulatory Directives*," Squire Patton Boggs Client Alert, March 2020.

Co-author, "Big Data is Not Untethered – Consumer Protections Exist," *Journal of Insurance Law and Regulation*, Federation of Regulatory Counsel, October 2019.

Co-author, "Federal Reserve Previews "Building Block Approach" to Insurer Capital Standards," Squire Patton Boggs Client Alert, January 2019.

Co-author, "Reinsurer Collateral Requirements: Covered Agreements and US Credit for Reinsurance Model Law," Squire Patton Boggs Client Alert, December 2018.

Co-author, "2019 Corporate Governance Developments – "Interesting Times" for Insurance Industry," Squire Patton Boggs Client Alert, December 2018.

Co-author, "Maine's RUUPA Must Be Opposed," Squire Patton Boggs Client Alert, December 2018.

Author, "2018 Election Results and Insurance Commissioners Summary Analysis," Squire Patton Boggs Client Alert, November 2018.

Co-author, "Recent Developments in the Federal Insurance Office," Squire Patton Boggs Client Alert, June 2018.

Author, "State Insurance Regulation – Increased Disparagement of the Regulatory Framework and a Call for Action," Squire Patton Boggs White Paper, April 2018.

Author, "Update on Florida Lawsuit Challenging Constitutionality of DMF Search Legislation," Squire Patton Boggs Client Alert, May 2017.

"Commencement of Insurance Policy and Duration of Risk," 8-84 New Appleman on Insurance Law Library Edition 84, New Appleman on Insurance Law Library Edition.

Hudson and Murphey, "Life Insurance, Unclaimed Property and the Death Master File: Towards a Uniform National Framework," White Paper Prepared for the American Council of Life Insurers (July 2014).

Speaking Engagements

Speaker, "How States May Look to Insurers to Bail Out COVID-19-Impacted Small Businesses," AmBest TV, March 25, 2020.

Speaker, "How Life Insurers Are Using Innovative and Compliant Predictive Models" AMBestTV, January 22, 2020.

Speaker, LexisNexis Risk Solutions Customer Advisory Meeting, Colorado Springs, CO, September 2019.

Association of Life Insurance Counsel, "Innovation in Insurance" (May 2019).

Property Casualty Insurers Association of America 2018 Annual Meeting, "Commissioner Panel" moderator (October 2018).

CEFLI 2018 Annual Meeting, "Future of Insurance Regulation" (September 2018).

ACLI Compliance & Law Section 2018 Annual Meeting, "'NAIC Regulatory Roundup" (July 2018).

Grange Insurance, Trailblazer Workplace Diversity ERO presentation (June 2018).

DRI, Life Insurance, Disability and Annuities Section, "Regulatory Update" and presentation, "State Insurance Regulation: Increased Disparagement of the Regulatory Framework and a Call to Action" (May 2018).

Insurance Advertising Compliance Association (IAdCA) Annual Meeting, "The Future of Insurance Regulation" (April 2018).

CEFLI Annual Meeting, "The Future of State Regulation" (panelist) (October 2017).

CEFLI Annual Meeting, "IIPRC and Product Innovation" (September 2016).

Life & Health Compliance Association, Unclaimed Property Update (September 2016).

Unclaimed Property Professional Organization, Life Insurance Update (March 2016).

CEFLI, Widening the Lens: Regulatory Modernization (February 2016).

CEFLI Webinar: 2015 Year in Review (December 2015).

Ohio Agent Ethics Issues, Ohio PIA (October 2015).

Ohio Agent Ethics Issues, Northeast Ohio Health Underwriters (August 2015).

CEFLI Unclaimed Property Summit V, Future of Unclaimed Property for Life Insurers (April 2015).

IRES Foundation Training, Update on Unclaimed Property Matters (April 2015).

American Council of Life Insurers, Forum 500, Unclaimed Property Update Panel (October 2014).

Presentation of White Paper "Life Insurance, Unclaimed Property and the Death Master File: Towards a Uniform National Framework" to NAIC Unclaimed Life Benefits (A) Working Group on behalf of the American Council of Life Insurers (July 2014).

Florida Chamber of Commerce, Insurance Summit, STOLI Discussion (January 2014).

American Council of Life Insurers, Local Affiliate Training, Unclaimed Property and Life Insurance Companies, Legislative and Regulatory Developments (November 2013).

American Fraternal Alliance Annual Meeting Workshop, "Unclaimed Property: Taming the Beast" (September 2013).

National Association of Insurance Commissioners, 2013 CLE Program, "Life Settlements and STOLI: A Case Law Update" (September 2013).

Association of Life Insurance Council Annual Meeting, "Recent Developments in Unclaimed Property" (May 2013).

Ohio Insurance Institute, Legislative Conference, "Unclaimed Property, Ohio Business to Business Exemption and Automobile Repair Claims" (March 2013).

Eastern Claims Conference, "Unclaimed Property Audits, Surviving Progress" (February 2013).

American Council of Life Insurers, Local Affiliate Training, Unclaimed Property and Life Insurance Companies – legislative and regulatory developments (November 2012).

American Council of Life Insurers, Annual Meeting, Unclaimed Property Audit and Market Conduct Developments; Unclaimed Property Audit Training (September 2012).

American Council of Life Insurers, Legal and Compliance Sections Training, Unclaimed Property Audit Developments (July 2012).

Association of Life Insurance Counsel, Unclaimed Property Audit Developments (March 2012).

The Ohio State University Moritz College of Law, Advanced Legal Communications Class, Guest Lecturer (March 2011, 2012).

National Association of Insurance Commissioners, Commissioner Conference, Improvements to State Regulatory System (February 2012).

American Council of Life Insurers, Annual Conference, Unclaimed Property and Life Insurance (November 2011).

IRES Foundation Training, Unclaimed Property and Life Insurance (May 2012).

American Council of Life Insurers, Local Counsel Training, Unclaimed Property and Life Insurance (May 2011).

Ohio Insurance Institute Panel Discussion, Industry Status Update (May 2011). Health Policy Forum, Discussion of Health Insurance Market Issues (April 2011).

Unclaimed Property Professionals Organization (UPPO) Annual Conference, Unclaimed Property and Life Insurance (July 2011).

Professional Service

National Association of Corporate Directors
2012 to 2016, Member.

Association of Women Directors
2015 to 2016, Member.

American Academy of Actuaries
2015 to 2017, Non-actuary member, Board of Trustees.

Association of Life Insurance Counsel

2015 to present, Member, Board of Governors.

2015 to present, Member, Audit Committee.

2014 to present, Vice Chair, Insurance Section.

2015, Vice Chair, Annual Meeting Program.

Ohio State Bar Association.

1989 to present, Member.

2012 to present, Member, Judicial Election Campaign Advertising Monitoring Committee.

Columbus Bar Association.

1999 to present, Member.

2001 to 2002, Member, Task Force on Sexual Orientation.

Ohio Human Rights Bar Association.

1992 to 1999, Trustee.

1993 to 1995, President.

1993 to 1995, Member Legal Team for challenge to Cincinnati Issue 3.

Elected and Appointed Public Service

February 2014 to December 2018. *Member, Columbus Board of Education, Columbus, Ohio.*

Appointed by unanimous vote of board members to serve as Member of the Columbus Board of Education; elected to full term beginning January 2016. 2014 to 2018. Chair, Audit & Accountability Committee 2014 to 2016. Chair, Finance and Accountability Committee

September 2004 to January 2007. *Councilmember, Columbus City Council, Columbus, Ohio.*

Appointed by unanimous vote of council members in 2004, and elected in 2005 to serve as At Large Member of Columbus City Council, after primary and general election races. Chair of the Jobs and Economic Development Committee, reviewing all job creation and employment and economic development incentive packages from the City Development Department, and also supported neighborhood business development efforts, such as Parsons Avenue Vision Plan and the 315 Research and Technology Corridor Plan.

Member, Columbus Partnership Economic Development Task Force.

Leadership Training

WELD Director Training for Attorneys (conducted by The Value Alliance)(2015).

Art of Hosting (2007). Community conversation training program.

Leadership Columbus (1999). Servant leadership training program.

Community and Non-Profit Board Service

Short North Alliance, 2020 to present.

Columbus City Schools

2014 to 2018, Member, Board of Education.

2014 to 2018, Chair, Audit and Accountability Committee.

2014 to 2016, Chair, Finance and Appropriations Committee.

Mt. Carmel College of Nursing

2013 to 2014, Board of Trustees.

Columbus Education Commission (Mayoral Appointment)

2013, Member.

2013, Chair, Operations Review Working Group.

United Way of Central Ohio

2012 to 2014, Board of Trustees.

2013, Chair Elect.

2012 to present, Chair, Public Policy Committee.

2003 to 2007, Board of Directors.

2004 to 2005, Chair, Health Vision Council.

Greater Columbus Arts Council.

2011 to 2014, Board of Trustees.

2012 to 2014, Finance and Audit Committee member.

2004 to 2006, 2011, Board of Trustees.

City of Columbus, Ohio.

2004 to 2007, Councilmember, Columbus City Council

2004 to 2007, Chair, Columbus City Council Jobs & Economic Development Committee.

2003 to 2004, Commissioner, Civil Service Commission.

2001 to 2003, LGBT Community liaison for Mayor Michael Coleman (volunteer).

2000 to 2003, Commissioner, Community Relations Commissioner.

TechColumbus (nka Rev1)(Nonprofit Business Incubator).

2005 to 2006, Board of Trustees.

SciTech (Nonprofit Business Incubator of The Ohio State University).

2005 to 2006, Board of Trustees.

Women's Fund of Central Ohio.

2014 to 2015, 2001 to 2007, Board of Directors.

2004 to 2005, Treasurer.

2001 to 2004, Secretary, Chair, Development Committee.

Human Rights Campaign and Human Rights Campaign Foundation, Columbus, Ohio and Washington, D.C.

2020, Co-Chair, Columbus Gala.

2013 to 2014, Emeritus Council, Co-Chair, Human Rights Campaign.

2001 to 2004, National Board of Directors, Human Rights Campaign.

2002 to 2004, Board of Directors, Human Rights Campaign Foundation.

2004 to 2004, Chair, Finance Committee, Human Rights Campaign Foundation.

2001 to 2004, Chair, Finance Committee, Human Rights Campaign.

1997 to 2001, Governor, National Board of Governors, Human Rights Campaign.

1998 to 2004, Member, National Finance Committee, Human Rights Campaign.

1997 to 2004, Member, Columbus Steering Committee.

Center for New Directions.

1996 to 1998, Trustee.

1997 to 1998, Treasurer.

Recognitions

2020, Chambers, Band-1 Insurance – Insurer: Individual and Group

2019, LGBT Victory Fund, Elected Service Recognition.

2018, Grange Insurance "Trailblazer Award".

2011, Independent Insurance Agents of Ohio, Independence Bell Award.

2010, PIA-Ohio, Industry Person of the Year Award.

2009, United States Department of Defense, Employer Patriot Award.

2009, Leadership Columbus Hall of Fame Inductee.

2009, UCAN Healthcare Advocate Award.

2008, YWCA Woman of Achievement.

2007, Equality Ohio Allies in Equality Award Recipient.

2006, Parsons Avenue Merchants Association, Southsider of the Year Award.

2005, Human Rights Campaign, Equality Award.

2005, Stonewall Columbus, Pride Parade Grand Marshall.

2000, Business First, "Forty Under 40."

2000, Stonewall Columbus Rhonda Rivera Award.

1999, Human Right Campaign, National Board of Governors, Governor of the
Year Award.

1997, Michael Howard Greer Humanitarian Award.

1996, Stonewall President's Leadership Award.